Early/ Mid-Career Seminar
Wednesday, May 29, 2019

USDA Beacon Complex, 6501 Beacon Drive, KC, MO

Agenda

7:30 **Registration**

8:00 **Welcome & Housekeeping** – Jeffrey O'Connell, USDA

8:10 **Thrift Savings Plan – A-Z –**
Stewart Kaplan, Thrift Savings Plan Board

- *Make Wise Decisions Today: Retire With Dignity Tomorrow*
- *Saving for Retirement: Your TSP Contributions*
- *Choosing a Tax Treatment: Traditional or Roth?*
- *Getting the Most Bang for Your Buck: Saving in the Thrift Savings Plan*
- *Accessing your TSP Money While Still Employed: Loans and In-Service Withdrawals*

9:45 **Break**

10:00 **Thrift Savings Plan – A-Z - Part II**

- *First Steps: Preparing for Separation*
- *Turning Savings to Income: The TSP Retirement Income Options*
- *Withdrawal Rules: Other Considerations*
- *Planning Your Legacy: TSP Death Benefits*
- *Getting Help: Resources for Participants*

NOON **Lunch (~12:00 pm to ~1:00pm)**

1:00 **TSP Follow up Questions**
Stewart Kaplan, continued, Thrift Savings Board

1:30 **Federal Employees Retirement System**
Myesha Williams, US Army Benefits Center, Fort Riley, KS

2:45 **Break**

3:30 **Social Security Administration Overview**
David Seymour, Senior Public Affairs Specialist, SSA, KCRAO

4:30 **Adjourn**

Presenters

STEWART KAPLAN, TSP Training and Liaison Specialist. Stewart joined the staff of the Federal Retirement Thrift Investment Board* in April 2013. As a member of the Office of Communications and Education staff, he conducts participant seminars as well ad in-depth classes for Human Relations and Payroll Offices for Federal agencies throughout the United States.

He retired from the Air Force in 2013 and help positions in the Marine Corps in Japan and the Air Force at the Pentagon as a Personal Financial Readiness Manager and Educator. He holds a Master of International Management Degree from Whitworth University and a Certificate in Financial Planning from Kaplan University.

Steward is an Accredited Financial Counselor and a Registered Financial Consultant. He also holds the designations of Retirement Plans Associate, Group Benefits Associate and Certified Employee Benefits Specialist through the International Foundation of Employee Benefit Plans of Wharton Business School.

MYESHA WILLIAMS, Lead Human Resources Specialist, Army Benefits Center, Fort Riley, Kansas. Myesha Williams assumed the position of a Team Lead at the Army Benefits Center in October of 2014. In this capacity, she is responsible for assigning work on branch 3 to include death and disability, estimates, retirements and TSP make-ups. Her additional duties include reporting civilian deaths to CHRA Headquarters.

Mrs. Williams' experience in federal service began in January of 2003 as a student hire at Fort Riley. Her Federal career spans over 16 years with the Department of the Army where she has held many different positions. She worked as an Administrative Assistant initially, then moved on to Research before becoming a Specialist. As a Specialist, she worked on the retirement team and the Death and Disability team before being promoted to her current position as one of the three team leaders over the Death and Disability team, DODEA and the Special Retirement Team (SRT). She is very well-versed in all areas of the federal benefits area.

DAVID SEYMOUR is the Senior Public Affairs Specialist for Region VII of the Social Security Administration. He began his federal service as a Congressional Aide, then joined SSA in the Chicago Region where he served as a Claims Representative, Operations Supervisor and Public Affairs Specialist. In 2016, David relocated to Kansas City to serve as a Technical Training Instructor for new SSA employees nationwide. He has taught Spanish language and Latin dance in the community and academic settings. His current duties in the Regional Public Affairs Office include serving as a liaison for congressional offices, assisting with media inquiries, and promoting public awareness and understanding of the programs Social Security administers.